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ABSTRACT

This manual is the result of a two-year study by Arizona State University involving identification and assessment of competencies needed in community education. The goal of the study is to help community educators (1) identify competencies needed for superintendents, principals, coordinators, and directors; (2) establish priority rankings for those competencies by role category; (3) assess actual performance of those competencies by role incumbents; (4) establish job descriptions for each of the roles; (5) identify areas needing role clarification; and (6) identify areas of role conflict. Chapters 1 and 2 discuss the procedures and theories that lead to competency identification and assessment. Chapter 3 details the steps necessary for identifying and validating ideal competency items, while Chapter 4 describes the actual assessment process. Analyses and suggested uses of the data are summarized in Chapter 5. An extensive appendix reproduces sample lists of competencies generated by workshops. (Author/LD)

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COMPETENCY-BASED
COMMUNITY EDUCATION ADMINISTRATION

VOLUME III: THE MANUAL

UNITED STATES OFFICE OF EDUCATION GRANT NO. G007701957

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PREFACE

This manual is the result of more than two years of work in competency identification and assessment undertaken by the Southwest Regional Center for Community Education Development, Arizona State University, Tempe, Arizona. The work, funded by grants from the United States Office of Education, attempted to define needed community education competencies for persons in the roles of superintendent, principal, district coordinator, and building director in a community education public school district. Once these competencies were identified, instruments were created and tested which aimed at assessing individuals' levels of achievement of the competencies. Throughout the process community education practitioners were the primary source of information and feedback. During several workshop sessions these people provided invaluable advice; indeed, this manual owes its existence to those community educators who gave their time and energies to what they saw as an important project.

This manual leads you through the process of community education competency identification and assessment which those individuals in Arizona and the Southwest followed--a process now considerably refined and honed to meet the needs of community educators. By the end of this manual you should be able to:

1) identify competencies needed for superintendents, principals, coordinators, and directors in community education;

2) establish priority rankings for those competencies by role category;

3) assess actual performance of those competencies by role incumbents;

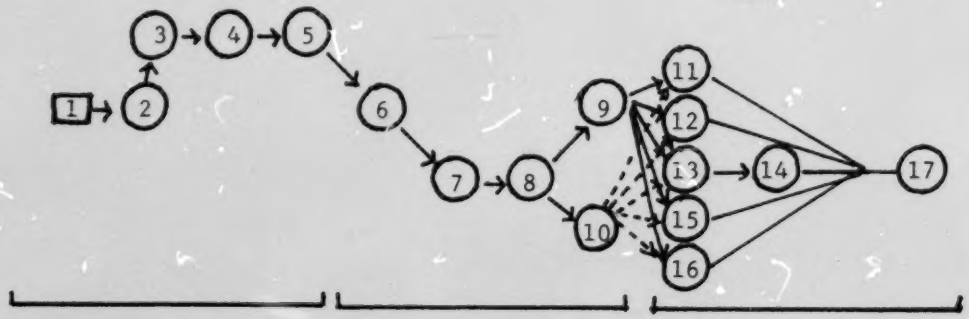
4) establish job descriptions for each of the roles;

5) identify areas needing role clarification; and

6) identify areas of role conflict (real or potential).

Thus, the manual can serve to improve generally the quality of leadership in community education at all administrative levels in a school district.

There are three steps in the competency-based approach: establishing, assessing, and analyzing competencies. The process, which this manual describes, is shown in more detail in the chart below:



Step 1: Establishing Competencies (Chapter III)

Step 2: Assessing Competencies (Chapter IV)

Step 3: Analyzing Competencies (Chapter V)

1. Orientation to QAM Competency Identification and Assessment; decision to adopt method
2. Selection of Task Force
3. Identification of Competencies by Task Force I
4. Validation of Competencies by Task Force I
5. Presentation of Competencies by Task Force I
6. Orientation for all Participants to QAM Competency Approach and Identified Competencies
7. Data Collection from Participants by Research Team
8. Data Analysis by Research Team
9. Data Presentation to Participants by Research Team
10. Data Diagnosis by Task Force II
11. Inservice on Competency Approach

12. Inservice on Role Clarification and Role Conflict Management
13. Data Collection on Participant Performance Assessment by Research Team
14. Data Analysis by Research Team
15. Staff Development Activities
16. Program Planning Activities
17. Analysis of Competency Assessment Activities (steps 7-16); Plans Made for Future Activities and Training

The manual is divided into six major sections. Chapters I and II discuss the concept of a competency as it is used in this manual and describe the procedures and underlying theories which lead to competency identification and assessment. Chapter III details the steps necessary for identifying and validating ideal competency items in your own district, while Chapter IV leads you through the actual assessment process. Analyses and suggested uses of the competency assessment data are summarized in Chapter V. The chapter outlines some recommended future steps which might be taken using the competency information already generated in your district. Hopefully, the final chapter will find you ready, willing, and able (competent!) to undertake a serious effort at local competency identification and assessment.

CHAPTER I: INTRODUCTION

The word "competency" may well be one of the most-used--and often-abused--words in education today. From teacher education programs to minimal graduation requirements, "competency" language is common. Yet, the users of that language often are unaware of the real meaning and impact of the competency movement for educational outcomes.

To begin with, it is important to understand the concept of a competency. A competency is the capacity to perform a specific task or assume a defined role at a satisfactory level of performance. You will note that a competency thus involves minimum levels necessary for satisfactory performance; it does not require the attributes of outstanding performance. The first point to be remembered, then, is that competency identification and assessment is geared towards average or satisfactory performance.

The second point in competency identification and assessment is that the process focuses on particular aspects--abilities, skills, knowledge--of a person's performance, rather than on his or her entire functioning in the job. Thus, an individual could be doing a "good" job and yet not meet the minimum competency levels expected for that job. Indeed, the task of identifying and assessing competencies is itself fraught with difficulties and questions which have yet to be surmounted or answered. Nevertheless, competency identification and assessment can be a valuable tool in improving professional performance. This is true not only for community education but for every other profession.

The Competency-Based Approach

The competency-based approach involves more than just the identification of minimal levels of task performance. It encompasses six major areas which aim at improving job performance. Those areas are:

1) the assessment of competency needs;

2) the specification of competencies;

3) the determination of competency components and performance labels;

4) the identification of competency attainment;

5) the establishment of an assessment process for competency attainment; and

6) the validation of competencies, attainment procedures, and the assessment system.

The assessment of competency needs involves three steps: a) the analysis of the jobs for which competency statements will be developed in order to determine functions presently incorporated in the roles; b) the examination of both theoretical and descriptive information about fields related to the targeted jobs (i.e., examination of the field of educational administration and/or public administration when focusing on community education leadership positions); and c) a survey of the characteristics of individuals who presently hold--or who hope to hold--the targeted jobs. This assessment can be done in a number of ways; whatever the method of analysis chosen, the product of this step is a general understanding of the competency needs for specified positions.

The second step, the specification of competencies, involves writing competency statements and identifying priorities by job category. This step builds on the information generated in the

first step; it is also crucial for all succeeding steps in competency assessment.

The determination of competency components and performance labels requires a detailed analysis of general areas of competency in order to assess whether those competency statements involve technical, conceptual, or human skills (or some combination of those areas); the analysis also involves establishing whether a familiarity, understanding, or application level is required for satisfactory levels of attainment. A technical skill deals with the manipulation of data or things--for example, writing reports, making budgets, or developing program brochures. A conceptual skill involves a knowledge of assumptions underlying a technique or skill as well as the effective application of logical processes to the analysis of problems--for example, determining the manner in which to promote community education in a community, or developing a community education policy statement for a district. A human skill includes any process or activity which relates to the effective independent and interdependent functioning of human beings--for example, working to improve employee job satisfaction or delegating responsibility.

In any situation these skills are needed at varying levels: familiarity (ability to recognize a skill or concept), understanding (ability to discuss a skill or concept), or application (ability to work with a skill or concept). A community education director, for example, may need to be familiar with accounting principles and practices, to have an understanding of school district budgeting procedures, and to be skillful in building and administering a community education budget. All of these are technical skills,

but they are used to differing degrees by the director, so knowledge of them may differ. It is implicit in this definition of knowledge levels that, while all skills are important for satisfactory job performance, some skills (or competencies) are more critical than others. Figure 1 illustrates the relationship of the nature of skills and the levels of competence required.

Figure 1: Competencies: Skills and Levels

Nature of Skill	Level of Competence Required		
	Familiarity	Understanding	Application
Technical			
Conceptual			
Human			

When we focus on competencies needed specifically for administrators we may also want to determine whether those competencies are managerial--that is, aimed at maintenance of organizational functions--or facilitative--competencies which aid others in the organization in completing tasks and in making change. These competencies may be related to the actual work of the administrator, to relationships of the administrator toward others in the organization, or to the administrator's ability to understand and manage himself or herself. This approach to administrative competencies is shown in Figure 2.

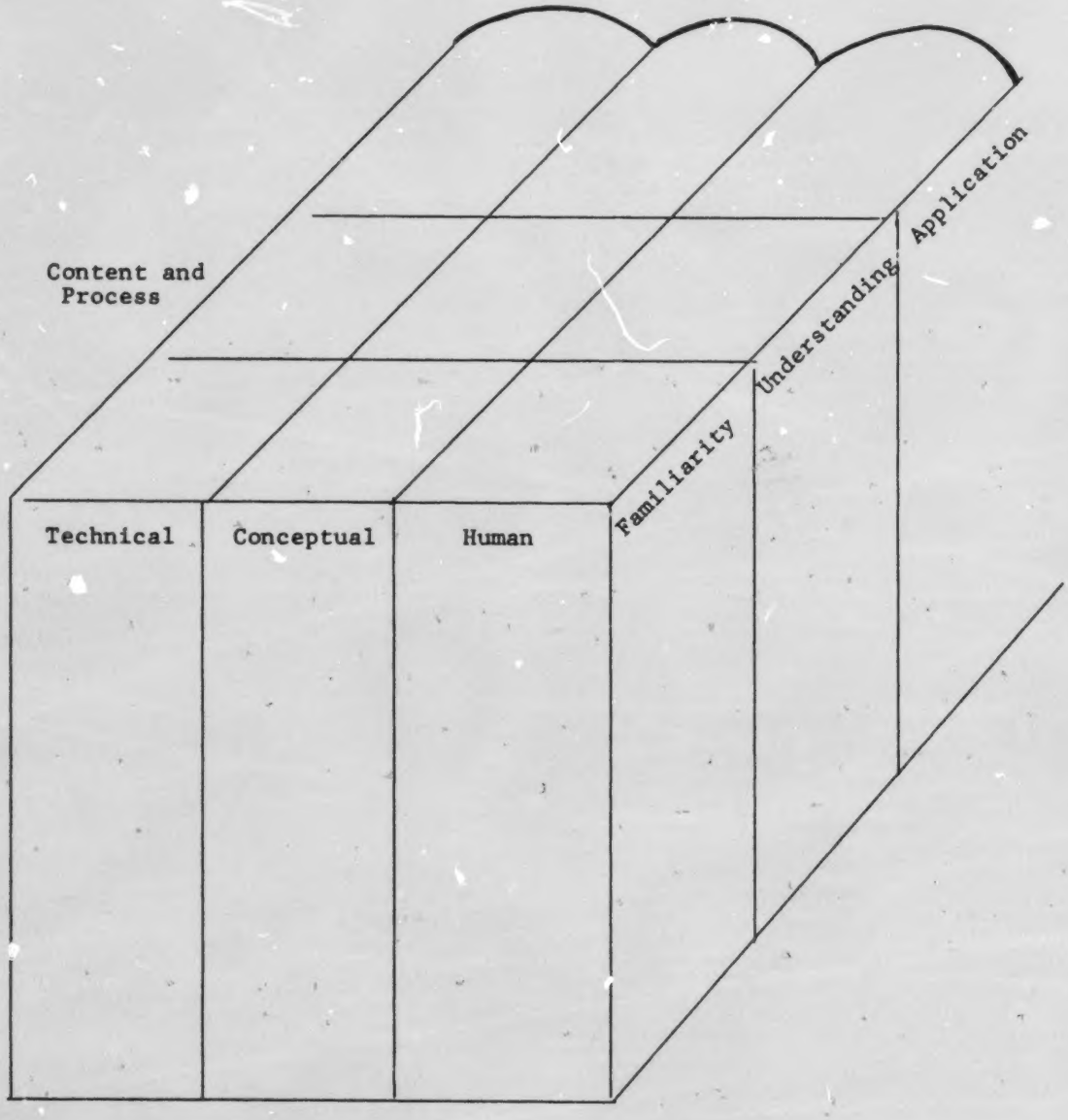
Figure 2: Types of Competencies

Type of Competency	Competency Related to:		
	Work	Relationships	Self
Managerial			
Facilitative			

The above discussion of types of competencies demonstrates how tremendously difficult is the task of identifying and writing competencies. Many competencies, for example, involve more than one type of skill. Additionally, a competency may be both managerial and facilitative, or may be related to work and relationships as well. The difficulty of the competency approach forces users to devote a good deal of effort to the task; this often results in a much clearer understanding of roles, of role conflicts, and of the essentials of satisfactory job performance. Thus, the competency approach can be a tool for inquiry, growth and change on a personal and an organizational level.

The identification of competencies and the establishment of performance levels are necessary before one begins the actual assessment of competency attainment. This assessment, steps four and five in the competency-based approach, pinpoints situations in which competencies can be learned--classroom versus field-based experiences, for example--and indicates that a competency has been learned. This is shown in Figure 3.

Figure 3. Competency Attainment Matrix



The final step in the competency-based approach looks at actual performance. This performance is looked at from both short-term and long-term perspectives. It is compared against competencies demonstrated in learning situations. And, finally, it is related to the information generated in the previous steps.

The process just described is outlined below:

Competency-Based Assessment

1.0 Assess Competency needs

- 1.1 Conduct job analysis
- 1.2 Examine content of relevant fields
- 1.3 Survey characteristics of those to be involved

2.0 Specify competencies

- 2.1 Write competency statements
- 2.2 Identify priorities by job category

3.0 Determine competency components and performance labels

- 3.1 Analyze statements into technical, conceptual, and human components
- 3.2 Establish performance levels: familiarity, understanding, application

4.0 Identify competency attainment

- 4.1 Identify content and methodology of formal learning activities
- 4.2 Identify reality-oriented experiences
- 4.3 Identify integrative experiences
- 4.4 Identify culminating experiences

5.0 Establish assessment of competency attainment

- 5.1 Identify and validate performance products
- 5.2 Identify and validate problem-solving products
- 5.3 Identify and validate value exemplars

6.0 Validate competencies, attainment procedures, and assessment

- 6.1 Identify performance criteria--immediate, short-term, long-term
- 6.2 Check actual performance with attainment procedures
- 6.3 Correlate assessment data with performance measures on the job

Products and Purposes of the Competency-Based Approach

At the end of one phase of a competency-based approach we should have the following products:

1) An analysis of the activities of job(s) with which we are concerned;

2) A list of competencies related to those activities;

3) A description of the skill type involved in each of those competencies and a determination of the level of knowledge required;

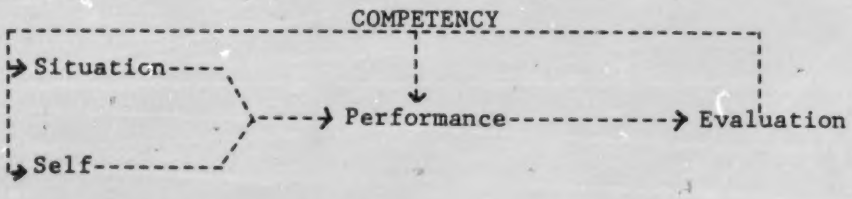
4) An analysis of situations where these competencies can be learned;

5) The identification of indicators that competencies have been attained in learning situations; and

6) The identification of indicators for on-the-job competency performance.

It should be emphasized that the competency approach is not simply an apprenticeship where elements of the status quo are passed on to new role incumbents with little or no change. Rather the competency approach views any competency in the situation in which it is applied. The particular demands of the situation, of the individual in the specified position, modify and often significantly change the definition of a competency and of its required performance. The evaluation of job performance within the competency approach can thus be tailored to meet individual or situational needs. We can see this in figure 4 below:

Figure 4: The Competency Approach



At this point we need to stop and ask ourselves, "Why assess competencies?" The answer to that question depends on the direction from which assessment is coming. If assessment is done by the individual who holds a particular job (or by several individuals who hold the same job), the competency-based approach to assessment allows that individual or those individuals to understand the requirements of the job better, and to determine areas in which additional experience or training is needed. In other words, self-initiated competency assessment allows the individual to work towards better job performance.

If assessment is done by the supervisor of an individual, the process can serve to identify specific weaknesses and strengths in an individual's performance without having to conclude that the individual is doing a "good" or "bad" job. For example, if the principal of a community school finds that the coordinator is weak in the area of program development, that competency need can be identified without implying that job performance in general is unsatisfactory. Of course, if there are enough areas which lack competency, the principal may conclude that the coordinator is performing unsatisfactorily. However, this assessment should not be a complete surprise to the coordinator, who will have been involved from the beginning in the identification of required competencies and the establishment of needed performance levels.

Finally, if assessment is done by a training institution, such as a university or a community college, instructors and curriculum consultants can determine areas in which more or less emphasis is needed for the training program. Such an assessment can revise and improve training and can lead to improved performance

by students who are trained in the revised program.

The competency approach, then, can answer questions such as:

1) Which of the competencies identified are important to performance for the community school director, according to superiors, subordinates, and peers?

2) Which of the competencies judged to be important need to be given priority in pre-service programs, which in in-service, which incidentally, which on-the-job, and which need no provision for acquiring?

3) What level of proficiency is judged to be important?

The responses to these and other questions can improve the understanding of community education and our performance as community educators. Hence, the goal of the competency-based approach to community education assessment is both improved community education leadership and an improved community education program.

CHAPTER II:

THE QUADRANT ASSESSMENT MODEL OF COMPETENCY ASSESSMENT

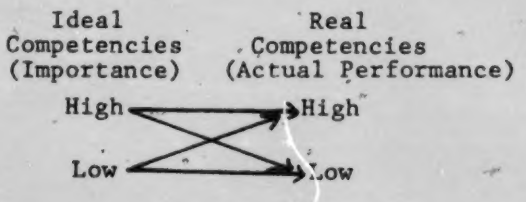
While there are many methods and models for competency assessment, the model which has been used in many parts of the country and in several fields of education is the Quadrant Assessment Model. This is the model which is the basis for the procedures described in the remainder of this manual.

The Quadrant Assessment Model

The Quadrant Assessment Model (QAM) has been developed and used by Gaston Pol and Lloyd E. McCleary of the Research and Development Laboratory, University of Utah, in assessing administrative competencies.

The first step in the model is the identification of both the ideal competencies for a specific job and the actual or real competencies as that job is performed. This is done by asking a selected group of people to rank, on a five-point Likert Scale, the importance of selected competency items, as well as the level of their actual performance by persons in a particular role. Average (mean) scores and standard deviations (or Indices of Agreement) for both rankings are generated; these scores serve in determining whether items are "high" or "low" relative to other items. These rankings are then compared in a logical way, as shown in the diagram below.

Figure 5: The QAM Approach



From the diagram we can see that four possible sets of relationships can occur between ideal and real competencies. These relationships are:

1) High Ideal--High Real: A competency is perceived as being important, and it is also perceived as being performed in a highly satisfactory manner. That is, practitioners possess the competency that is rated "High Ideal." A High Ideal--High Real competency should be given high priority in
   a) planning and conducting preservice training programs;
   b) determining entry-level competencies for particular roles;
   c) determining certification criteria for those roles; and in
   d) evaluating the performance of practitioners.

2) High Ideal--Low Real: A competency is judged to be important, but most (or some) practitioners do NOT possess the competency. Such a competency needs to be of concern in the planning of inservice programs for present practitioners; it also should be considered in the revision of existing preservice programs, since it appears that present training is insufficient for that skill or knowledge.

3) Low Ideal--High Real: A competency is thought to be relatively unimportant; however, in practice it is performed in a highly satisfactory manner. It may be that the competency is over-emphasized in practice and that inservice programs should address the issue of role definition and clarification. Such a competency should not be emphasized in research or certification considerations.

4) Low Ideal--Low Real: A competency is perceived as being relatively unimportant and, in addition, it is receiving little emphasis in practice. Such a competency needs to be given little if any attention in preservice or inservice programs.

The QAM can be used by a group of people holding the same or similar jobs. It is also quite useful when other groups--subordinates, peers, and superiors--provide their ratings of ideal and real competencies for specified jobs. For example, superintendents and principals may give valuable insights into the ideal and real competencies for a building-level community education director.

When ratings are used from several groups, a statistical measure is used (the Kendall W-correlation of concordance) to assess the extent of agreement among rating groups. Only those competency statements which exhibit high agreement among all groups are then used in competency assessment. Low agreement on statements probably means that there is some role conflict, or that role clarification is needed.

The Quadrant Assessment Model, as outlined above, has several advantages over other assessment procedures. First, it is a field-based procedure, since the competency items are generated and validated by practitioners. Second, it allows for a prioritization, or ranking, of competencies, so that the more important ones receive more attention in assessment as well as in training. Third, it can be time- and situation-specific to meet particular needs and demands. Finally, the QAM is closely linked to training programs, both inservice and preservice, since it can identify easily items which need more or less emphasis, as well as the level of proficiency required. It can also be readily used in sessions where practitioners seek to define, analyze, and clarify their respective roles and to moderate or eliminate role conflict. These applications will be described more fully in Chapters Five and Six.

An Application of QAM

One way to understand the operation of the QAM is to see a full application of the model. The remainder of this chapter is a description of how Ideal competency items were generated and validated by community educators in the Southwest Region of the United States. While this is not the only manner for developing items, the procedure should clarify the QAM process for the user

of this manual.

The first planning session for the Southwest Center Community Education Administrator Competencies Workshops was held to discuss: (1) timeline for the project; (2) decision points for changes; (3) attendance of participants; (4) possible sites; (5) project staff; and (6) future planning sessions. Selection of participants was made in order to assure distribution in the following areas: (1) geographic characteristics; (2) urban, suburban, and rural characteristics; and (3) districts with teams of superintendents, principals, district community education coordinators, and building community education directors who were committed to the community education concept. The district teams were then contacted, and an investigation of workshop sites was reviewed. (see Appendix A)

The first workshop to determine needed competencies for community education administrators was held and sixty-three practitioners, representing 17 school districts throughout the state of Arizona, attended. Representing each district was at least one of each of the following: superintendent, building level principal, district level community education coordinator, and building-level community education director.

The purpose of the first workshop was to develop an exhaustive list of tasks and competencies needed in the development and administration of community education programs. Practitioners met in work groups by role to examine role expectations, identify administrative task areas, and begin developing statements descriptive of competencies within each task area. The workshop program was designed for both large and small group sessions.

At the next planning session, materials produced at the first workshop were reviewed and details for the second workshop session were discussed. Specific objectives for the second workshop were finalized and workshop procedures to accomplish objectives were agreed upon.

The second workshop used a panel method to review competencies developed in the first workshop, condense statements to eliminate duplication, examine "fit" across roles, and edit a final list of competencies to be employed to attain ideal ratings in this phase of the project. The program format for this workshop was similar to that of the first in that the participants met in both large and small group sessions. The list of competencies generated by the first and second workshops is included in Appendix B.

During planning sessions for the third workshop, an instrument was constructed for data collection of the IDEAL ratings of competencies. The instrument to collect ratings was completed and then mailed to all participants of the first workshop. This instrument can be found in Appendix C.

The project director and consultant then met to process data collected from the mailing. Results were tabulated and analyzed. Third workshop plans were prepared including: (1) development of a self-rating instrument; (2) preparation of the program; and (3) review of participant list.

Sixty-nine community education practitioners met in a final workshop session to examine the product of the first two workshops and to complete and evaluate a self-assessment or self-rating instrument for the competency items. (see Appendix D) During this

third workshop, participants also discussed specific tasks related to competency items and generated plans and improvements for future training and developmental work.

The conduct of the project led to the accomplishment of three objectives:

(1) the assessment and determination of competencies needed by community educators and the validation and cross-validation of those competencies;

(2) the establishment of areas for certification in community education based on real and measurable skills as opposed to institutionally-certified courses and degrees; and

(3) the encouragement of administrators to reflect on their roles and to engage in self-assessment.

The field-based approach enabled the identification of key task areas and competencies and also created a climate of self-renewal through the collective evaluation of roles and the comparison of ideal prioritizations of tasks and competencies. Also, resultant data and the final product gained a high degree of acceptance due to their field validity.

This brief review of one competency-based project is an introduction to the Quadrant Assessment Model. The next three chapters will take you step-by-step through the process as it is used on a local or regional level.

CHAPTER III:

STEP ONE: ESTABLISHING AND VALIDATING COMPETENCY ITEMS

The first two chapters of this manual provided background information which is important in understanding the competency approach. The real strength of that approach, however, lies in its field application. In this chapter we begin that application process by helping you, the manual user, to lead others in establishing and validating competency items.

Methods for Establishing a Competency List

The method you choose to develop a list of competency items is somewhat dependent on both your own skills and capabilities and those of others in the district. Several procedures from which to choose are outlined below.

Working from an existing competency list. This procedure is perhaps the easiest of those described here. Its chief disadvantage is that you or your task force may overlook situation-specific competencies. A further difficulty is that little work has been done which describes competencies for a particular program across role categories; the competency list generated by participants in the Southwest Regional Center project (Appendix B) is thus one of the few--if not the only--list which is complete in this respect. Even if you feel that a selected list of competency items is accurate and complete, you should allow others--the superintendent, principal, program coordinator, teachers, participants, or other concerned persons--to read and react to the list. This is best done in a group setting, where the ideas of one individual may generate ideas in others. You may need to appoint a task force to summarize

and review the suggestions of the larger group; the revised list should then be presented again to the group for their final approval.

The Delphi Technique. The Delphi Technique is a useful means for gaining consensus from many individuals without having to bring those people together in one place at one time. Its disadvantage is that it does not involve face-to-face interaction and problem-solving. However, it can generate new information and serve to achieve consensus.

The Delphi Technique gathers information through a series of questionnaires. In the first questionnaire, a suggested list of competencies may be offered, or a set of questions may be developed which identify potential areas necessary for job performance. This questionnaire is then mailed to all individuals from whom you seek information and feedback. A second questionnaire, which reports the opinions expressed on the first questionnaire and which now asks respondents to rate and rank the list of opinions into a given number of priority categories, is sent to the same individuals. Similarly, a third questionnaire is mailed to respondents which reports the results of the second questionnaire. Respondents can then reconsider their responses; if they find their responses differ greatly from those of other respondents, they are asked to specify their reasons for these differences. A final questionnaire reports the results of the previous questionnaire along with any minority opinions of those who do not agree with the general consensus of the group. This questionnaire is the final chance for respondents to give their feedback. The results of the Delphi Technique should be a list of competencies on which a specified group of respondents have achieved consensus.

A Town Meeting. While we generally think of a town meeting as involving large numbers of people from a defined neighborhood, we can also think about a town meeting of all individuals who have responsibilities in planning for or administering community education. Depending on your district size and level of implementation, that number may range from only a few to as many as 40 or 50. A smaller district may consider working initially with another small district in order to increase the "brainpower" available.

In a town meeting an individual serving as convener and facilitator leads the group in identifying competencies by asking key questions. One way to begin this process is to ask participants to list everything they normally do in their jobs. These then can be categorized and classified by the group into competency areas.

A town meeting can quickly generate needed information. However, to validate those competency items you will need to contact town meeting participants several weeks after the meeting and ask them to react to the list developed at the meeting. Individuals should probably react not only to the list for their own role category but also to lists for other categories.

Other procedures. There are other procedures than the three outlined above; indeed, any group decision-making process can be adapted to the competency-generating task. Whatever procedure is chosen, the leader should remember the following items:

a) all persons whose jobs are or potentially could be affected by this process should be invited and encouraged to participate;

b) the importance of the task should be emphasized throughout the process;

c) the relationship of this task to the entire competency approach should be described;

d) methods should be used which maximize each individual's participation while taking advantage of the strengths of the group process;

e) the continuing goodwill of participants should be sought before, during, and after the task; and

f) methods should be established for the validation of competency items which are developed by the group. This may include reliance on a panel of experts or the use of another decision-making process with the same or with different individuals. An item is "valid" when you are sure that the item is indeed a needed competency for your district.

Establishing a Competency Item List in Happy Valley District

Happy Valley School District--an imaginary district whose competency approach will be "studied" in this manual--has an ongoing community education program. The district coordinator has decided that, in order to improve both the program and the performance of those who administer the program, the district should adopt both a management-by-objective system and a competency-based approach to performance assessment.

The coordinator first identifies 23 people who are responsible in some way for the successful operation of the program: herself; the Assistant Superintendent for School and Community Services; the Supervisor of Federal Projects (her immediate supervisor); eight building Principals; six Community School Directors; and six part-time Building Supervisors. In September, she gathers these people together for an orientation session; she then asks for a task force of five people (including herself) to draw up an initial list of needed competencies for the roles of Coordinator, Principal, and Director. Volunteers to the task force include her supervisor, a Building Principal, a Director, and a Building Supervisor.

The task force meets during the next two months and, in early November, presents tentative lists of competencies to the larger group. These lists have been developed primarily from established job descriptions in the district's policy and procedures handbook. The larger group makes some modifications and additions in the task force's lists; these lists are then presented to the District Superintendent, the Director of the Community Education Center of a nearby university; the Community Education Specialist in the State Department of Public Instruction; and to another District Coordinator in the state. These four people review the lists and, at a meeting in late November, make suggestions and modifications. These lists are once again presented to the large group, which in early December, approves the competency lists. Happy Valley's community education program is now ready to move to the second step in the competency approach.

As a postscript, we should note that the coordinator in Happy Valley was fortunate to receive the cooperation of all district personnel. Had this cooperation not been so easy to obtain, she would have attempted the competency approach with only those who were willing to participate. Later others, after seeing the approach and realizing that it did not involve a personal threat to them, might also participate. Such a gradual implementation of the competency approach may be necessary in many districts where people are unfamiliar with the approach. When well organized, however, the approach sells itself, and full participation should be forthcoming.

CHAPTER IV:

STEP TWO: ASSESSING COMPETENCIES

Developing a list of competencies for specific jobs is only the first step in the competency approach. The second step is using that list in a competency assessment. This assessment has three parts: orientation, data gathering, and diagnosis.

Orientation

An orientation session is necessary for staff members who have not been involved in developing the competency list; it also may be important for those who have already worked on that task. In any case, all people who in any way will be part of the assessment process should be oriented to the purpose and method of the competency approach.

An orientation session brings everyone together. It should include the following topics:

1) a brief description of the competency approach and why/who/how the district became involved in it at this time;

2) an explanation of the work that has already been done in the district (i.e., instrument development);

3) a reassurance to participants that the competency approach will be used for the improvement of the program, not for hiring or firing decisions;

4) an explanation that evaluation performed as a part of the competency approach will be formative evaluation aimed at individuals' self-development; and

5) a walk-through of an example of each of the competency instruments which will be completed by the participants.

Data Gathering

Each participant will usually complete a minimum of three

competency instruments: an assessment of the Ideal competencies for the position the participant holds; a self-assessment of the participant's own Actual or Real competencies; and an assessment of the Real competencies as actually performed by each of the incumbents of the other role categories being assessed. The district coordinator in Happy Valley would, for example, first complete Self-Ideal and Self-Real instruments for the coordinator position. She would then complete an Other-Real instrument for the Assistant Superintendent, for the Federal Projects Supervisor, and for some (if not all) the Principals, Community School Directors and Building Supervisors. (These instruments appear in Appendix D.)

Obviously, completing these instruments can be time consuming in a district with an extensive program like that of Happy Valley. It is therefore important that sufficient time be set aside and planned for in the competency approach. In addition, the Self-Ideal Assessment should probably be completed at a different time from the Self-Real Assessment , so that the ratings on one do not affect the ratings on the other. Above all, it is essential to stress the importance of the assessment process and the instruments and to do everything possible to encourage participants to devote time and thought to the process.

Data Diagnosis

The third part of this stage of the competency approach is the compiling and diagnosis of the data gathered by the instruments completed by participants. In this process three profiles are developed for each participant: an Ideal, a Self-Real, and an Others-Real profile.

The Ideal profile is developed by summing the rankings and

then determining the mean of the ratings for all incumbents of one particular role category--all supervisors, for example. If there is only one person in a particular role category, then the single rating of that person becomes the Ideal rating. When two or more items receive the same mean score, the tie is broken by the item with the lowest standard deviation (that is, where there is greatest agreement among respondents) receiving the highest ranking among the items . Items are then ranked by mean score from highest (mean score of five) to lowest (mean score of one). Those items ranking in the top half are considered to be of relatively high importance in the Ideal sense, and those in the lower half to be of relatively low importance. This ranking provides a profile of the Ideal role incumbent.

The Self-Real profile is unlike the other profiles in that it involves the responses of only one person: the participant. Each person rates his or her own competencies as ones in which he/she has high (rating of five) to low (rating of one) competence. These items are then ranked from high to low, and those in the top half are considered to be items in which the respondent is relatively proficient, while those in the bottom half are items for which the respondent feels he or she has less ability. It is important to remember at this point that all items in all profiles are ranked relative to one another. Therefore, in the Self-Real profile, a relatively low-ranked item may still be an item in which the respondent feels fairly satisfied with his or her performance. The significance of the rankings, as we shall see in the next chapter, is in how those rankings relate to one another across profiles, more than in the rankings as isolated entities.

The Others-Real profile includes the perceptions of others with whom the participant works regarding that participant's performance. This profile is most satisfactory when several other people (three as an absolute minimum) rate the participant. The item ratings of these others are then summed and a mean and standard deviation found for each item. Then, as in the other profiles, the items are ranked from high to low, based on mean scores (five being highest) and standard deviations (where a tie exists). The items are then divided into high and low groups, as with the other profiles.

*Data Diagnosis in Happy Valley**

After the orientation session, participants in the competency assessment process of the Happy Valley Community Education Program completed the several instruments in their own offices and returned them to the Personnel Director, who served as a disinterested party in the process. The Personnel Director then compiled and diagnosed the data from these instruments. For the purpose of this illustration, we will assume that these data dealt with only eight items; the data for two of the positions surveyed follows:

*
further examples of competency instrumentation and data can be found in Appendix E and in Volume I: The Research Report.

Data: District Community Education Coordinator

RATING:	Self-Ideal (1 rating)	Self-Real (1 rating)	Others-Real (10 ratings)
Item 1 (Council)	5	4	4.2 s.d.= 0.91
Item 2 (Needs Assess)	5	5	3.5 s.d.= 1.67
Item 3 (Prog. Eval.)	4	4	4.7 s.d.= 2.00
Item 4 (Pers. Eval.)	2	2	3.5 s.d.= 0.78
Item 5 (Staff Dev.)	3	2	3.1 s.d.= 0.98
Item 6 (Public Rel.)	3	3	3.7 s.d.= 1.11
Item 7 (Promotion)	3	4	3.3 s.d.= 0.45
Item 8 (Budget)	5	3	4.2 s.d.= 0.35

PROFILES:

Self-Ideal	Self-Real	Others-Real
Item 1	Item 2	Item 3
Item 2	Item 1	Item 8
Item 8	Item 3	Item 1
Item 3	Item 7	Item 6
Item 5	Item 6	Item 4
Item 6	Item 8	Item 2
Item 7	Item 4	Item 7
Item 4	Item 5	Item 5
= tie		

Discussion of Data

In examining the data from the coordinator it is most important to pinpoint and analyze differences in the ratings. For example, the coordinator rated a competency related to budgeting (item 8) as being relatively important, but rated her own competence in that area as relatively low. However, others who rated her felt that she was relatively capable in handling budget items. The differences here can lead to a more careful assessment by the coordinator

and to discussions with others about their expectations in the area of budgeting.

Another difference occurs in Item 2: Needs Assessment. The coordinator ranked herself relatively high in that skill for both the Ideal and Real Assessments. However, others rated her relatively low in needs assessment. This, then, is an area needing some role clarification and, perhaps, some skill building. Other differences which occur can be handled in a similar manner.

Data: Building Community School Director

(Individual: John Doe)

RATING:	Self-Ideal (8 ratings)	Self-Real (1 rating)	Others-Real (10 ratings)
Item A (Commun)	4.6 s.d.= .47	5	4.0 s.d.= .94
Item B (Pub. Rel.)	4.0 s.d.= .66	3	3.6 s.d.= 1.02
Item C (Records)	2.9 s.d.= 1.60	4	3.9 s.d.= .21
Item D (Meetings)	3.7 s.d.= .52	5	4.0 s.d.= .71
Item E (Schedules)	3.1 s.d.= .31	2	2.7 s.d.= .65
Item F (Staffing)	4.9 s.d.= 1.21	2	2.5 s.d.= 1.11
Item G (Eval.)	3.5 s.d.= 2.11	1	2.0 s.d.= .58
Item H (Work w/ K-12)	2.5 s.d.= 1.40	4	3.1 s.d.= .39

PROFILES:

	Self-Ideal	Self-Real	Others-Real
HIGH	Item F	{Item A	Item D
	Item A	{Item D	Item A
	Item B	{Item C	Item C
	Item D	{Item H	Item B
LOW	Item G	Item B	Item H
	Item E	{Item E	Item E
	Item C	{Item F	Item F
	Item H	Item G	Item G

{ = tie

Discussion of Data

The data on the community school director illustrates two of the benefits of a greater number of raters--the distinction between high and low is more easily made, and the Ideal rating is a more general description of needed competencies for that role. The profile of John Doe reveals several interesting bits of information, among them: a) the Item ranked highest in the Ideal (F: Staffing) is ranked very low in the Real, both by John and by others; b) all raters ranked Communication (Item A) as relatively high; c) Record keeping (Item C) was ranked low in the Ideal and high in the Real; and d) Public Relations (Item B) is ranked high in the Ideal and in the Others-Real but low in the Self-Real. From a cursory analysis John could conclude that he needs to give little additional attention to Communication, is perhaps giving too much time to Record-keeping, and needs to initiate some discussion or skill-building in the areas of Staffing and Public Relations.

The profiles given above for the Community Education Coordinator and Community School Director suggest some areas for further analysis, training, and role definition/clarification. These issues will be discussed in greater detail in the next chapter.

CHAPTER V:
STEP THREE: ANALYZING AND USING COMPETENCY DATA

It is important to collect and compile competency data carefully; it is equally important to analyze the data and to develop procedures for using the information generated by the data. This chapter will outline some of the major ways that competency data can be used. It will look at three areas where the data can be used for immediate planning: performance assessment; role definition and clarification; and role conflict identification and resolution. The chapter will also examine how data can be used in long-range planning and organizational development.

Performance Assessment

The need for objectives, valid instruments, and methods for assessment of job performance is generally accepted in education. This assessment is often a difficult and time-consuming task, and it is often conducted in ways which are counterproductive to the improvement of performance. The competency approach described in this manual allows for a sequenced and logical procedure for performance assessment with a built-in feedback process. Role incumbents understand the performance required of them, particularly if they are involved in the development of competency statements. Competency statements can also be made situation- and time-specific by the relating of Ideal ratings to Real ratings. For example, the teaching of reading skills may be given highest priority in the Ideal during one year and given a lower priority in the succeeding year; teachers who, in line with district expectations, give less attention to reading in the second year will not, therefore, suffer from lower ratings in job performance, since their Real performance will be

related to the Ideal performance for the district.

The assessment process begins with the development of competency statements and the subsequent ratings of the incumbents by themselves and by others (superiors, subordinates, and peers). Comparisons between the ratings of others and those of the role incumbent provide information about actual performance and about perceptions of performance. The assessment results in the previous chapter and in the table and discussion below are examples of this step in performance assessment.

Position Assessed: Director of Community Education

Incumbent: Mary Jo Banker

CATEGORY I - Items* Ranked as:

High Ideal and High Real

by Self			by Administrators			by Teachers		
Rank	T-Score	Item	Rank	T-Score	Item	Rank	T-Score	Item
1	62.6	9	1	65.8	3	1	65.1	8
2	61.9	7	2	64.9	8	2	64.7	9
3	60.2	8	3	62.3	7	3	63.8	3
4	60.1	3	4	61.7	10	4	61.5	10
			5	61.7	1	5	61.2	4

CATEGORY II - Items Ranked as:

High Ideal and Low Real

by Self			by Administrators			by Teachers		
Rank	T-Score	Item	Rank	T-Score	Item	Rank	T-Score	Item
1	60.3	2	1	61.8	2	1	60.9	2
2	58.9	1	2	60.1	2	2	59.8	1
3	57.1	4	3	59.8	9			

CATEGORY III - Items Ranked as:

Low Ideal and High Real

by Self			by Administrators			by Teachers		
Rank	T-Score	Item	Rank	T-Score	Item	Rank	T-Score	Item
1	56.8	12	1	58.4	5	1	59.6	11
2	55.9	5	2	57.3	12	2	58.4	7
						3	57.6	5

CATEGORY IV - Items Ranked as:

Low Ideal and Low Real

by Self			by Administrators			by Teachers		
Rank	T-Score	Item	Rank	T-Score	Item	Rank	T-Score	Item
1	54.3	10	1	57.1	4	1	56.6	12
2	51.7	6	2	56.8	6	2	55.1	6
3	50.6	11						

*These Item Numbers do not refer to specific competencies but are used for illustrative purposes only.

There is agreement in the placement of ratings of competency items numbers 8 and 3 in the High Ideal - High Real category, number 2 in the High Ideal - Low Real Category, number 5 in the Low Ideal - High Real Category, and number 6 in the Low Ideal - Low Real. Competency items 8 and 3 are judged to be important and are judged to be done well. Competency Item 2 is judged to be important and not being done well. Competency Item 5 is judged to be of low importance and has received undue treatment. Competency Item 6 is judged to be of lesser importance and is being so treated.

The Director and the Principals agree upon the rating of Competency Item 7 as High Ideal - High Real, and the Director and Teachers agree that Competency Item 9 is in that category. That is, the Principals view number 7 as important and receiving adequate treatment while the Teachers view number 7 as relatively unimportant (see Category III, Low Ideal - High Real) and receiving undue treatment. Likewise the Teachers view number 9 as important and being treated as such while the Principals view number 9 as important and not being adequately treated (Category II). These competencies might well represent real conflict between teachers' and principals' expectations, with the director caught in the middle trying to meet the expectations of both.

Competency Item numbers 4 and 11 lack any agreement between raters. Item 8 is a competency which should be of concern, since the Principals and Teachers see it as important and as being adequately addressed, while the Director sees it as being of low importance and not being treated as important. Thus, Items 4, 11, and 8 are excellent places to begin the discussion of the performance of the Director.

Competencies rated and analyzed in this manner provide an objective, relatively emotion-free and data-based means of examining performance. From such analysis planned improvement, role conflict, and role clarification can be considered. In addition, such analysis can serve as the basis for staff development activities, thus improving the performance of the entire organization as well as that of each individual in the organization.

Role Definition and Clarification

The Ideal side of the Quadrant Assessment Model provides a means for defining and clarifying roles through the analysis of role expectations by various groups. Each role can be examined and defined in competency terms. Areas where further definition and clarification are needed can also be pinpointed. This can be seen in the previous example, where the director, principals, and teachers do not always agree on Ideal ratings. In many cases, roles may become defined specifically for the first time with this process. The development of job descriptions through the competency approach is important not only to present job holders but also to future job applicants. It can be expected that hiring procedures will be improved when both employer and prospective employee understand the specific expectations of a job.

The competency approach also encourages the identification of situation-specific competencies and a resulting analysis of contributing conditions. In Happy Valley, for example, a competency rated as high for the coordinator in both the Ideal and Real spheres was the "ability to generate non-district funding for community education programs." This competency did not occur in lists developed by other districts. When the administrative team examined this

and other situation-specific competencies it began to realize that, despite the extent of the program, the Board had never made a formal commitment tc community education. With this in mind, the administrative team appointed an inter-agency task force which, during the following year, developed a position paper and a statement of policies and procedures relating to community education, submitted those documents to the Board, and won Board approval for them. The competency approach in Happy Valley thus had some fortunate though unintended consequences.

Role Conflict Identification and Resolution

A third immediate use of competency data is in the identification and resolution or management of actual or potential role conflicts. A role conflict exists when two or more individuals or groups of individuals do not share the same set of expectations about the performance required by a particular job or category of jobs. A role conflict can be identified when one person or group rates a competency as high priority and another groups rates it as low.

In Happy Valley the role conflict identified by the competency approach involved the supervision of community education activities undertaken by certificated personnel. Both principals and central office personnel rated that area as a high priority for principals. Community School Directors, however, rated the area as a high priority for themselves and not for the principals. When this area of conflict was identified, the coordinator asked all principals and directors to meet with her. At that meeting the group began to air their concerns regarding both program and personnel evaluation and supervision. Although directors were certificated personnel,

principals felt that, because of legal constraints evaluation and supervision were within their domain. Directors, however, felt that, to assure quality in the community education program, they needed to supervise activities. As the discussion progressed other areas of concern surfaced. It soon became clear to the group that the real issue was, "Who's in charge here?" During the following year the coordinator visited all principals and directors regularly and developed several in-service sessions to address the issue. In some schools in Happy Valley the conflict still remains, but the coordinator and district staff are now aware of the problem and of the need for continually attending to it.

The Long-range Perspective

Immediate problems and issues can be solved or worked on using the competency approach. In addition, the approach permits a district to take a long-range look at itself and the community education program. Such a look can begin to raise and address some of the following questions:

1) Are there areas where our organization needs further development? (For example, the need for formal inter-agency cooperative agreements, or the need for training of directors in process facilitation)

2) Are there areas where our organization needs to change?

3) How can staff development be matched with the ongoing assessment process of the competency approach?

4) What should a staff development plan include? Who should be involved?

5) What are our future priorities for each of the roles? What do we expect the Ideal to look like in five or ten years? How can we plan for those priorities?

6) What are our future plans for community education? How will those be reflected in future competency assessments?

Using the competency approach as a basis, the district may decide to set up a permanent committee to monitor the competency identification and assessment process. It may develop concrete plans for in-service training, make explicit the expectations for pre-service training, or identify areas needing improvement in a one-to-ten-year period. The following timeline for Happy Valley is one example of how the competency-based approach can lead to long-range planning and development. The competency approach is thus a logical process which can be used for the improvement of community education.

Timeline for OAN Competency Approach in Happy Valley School District

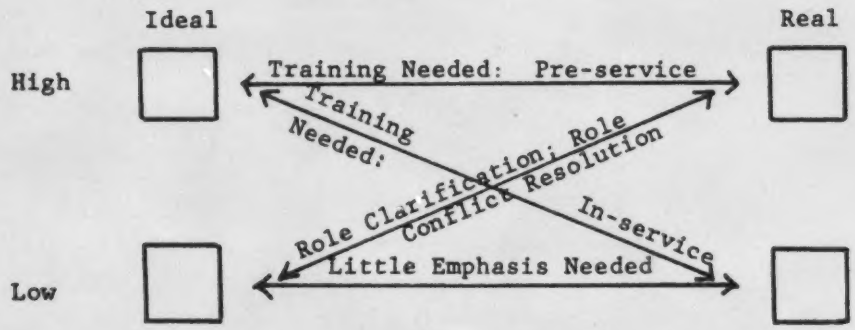
	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March	April	May	June	July
Year 1	Initial Meeting all Administrators	Task Force meets, develops competencies		Competency list validated	Task force presents Competencies to group; competency list accepted	Orientation session	Data gathered Ideal Real-S Real-O	Data Compiled	Preliminary Analysis	Meeting with participants; data diagnosis	Task force diagnosis of data	
Year 2	Inservice on Competency Approach		Task Force On Inservice (as identified by Assessment)	Planning	Role conflict identified	Role Conflict management session	Role conflict management session (cont.)	Plans begin to be implemented Performance Assessment		Evaluation of Assessment data of participants		
Year 3	Inservice	Ongoing Work in Performance Assessment/Role Clarification/ Role Conflict Management/Staff Development/Program Planning					Ongoing Work in Performance Assessment/Role Clarification/ Role Conflict Management/Staff Development/ Program Planning (cont.)					

CHAPTER VI: CONCLUSION

In this manual we have explored the competency approach both generally and in its specific application. We have described one methodology which has been found useful in the community education setting. We have also suggested ways in which the competency approach can be used to improve both individual and organizational performance.

The competency approach can be used in different ways in each district or setting; this is to be expected and is, in fact, one of the strengths of the approach. New programs, for example, may use it on a much different level than well-established programs. On a statewide or regional basis the approach described in this manual can be a means to conduct a need assessment and to plan programs as the following diagram illustrates:

QUADRANT ASSESSMENT MODEL AS A
NEED ASSESSMENT DEVICE



Finally, researchers and persons concerned with training and with certification procedures can apply this approach in the improvement of their programs and procedures. Hopefully, all community educators at all levels will develop a common understanding of the goals

and purposes of their programs and of community education. The roles, responsibilities and expected outcomes of the competency-based approach in community education are summarized in the table below:

Step-Where found in Manual (WHAT)	Responsibility/Role (WHO)	Expected Outcomes (WHY)
1. Identification and validation of needed competencies (Ideal Profile) (see Chapter III)	Task Force	Analysis of jobs; description of tasks; Improved understanding of community education.
2. Assessment of Ideal competencies (see Chapter IV)	Role Incumbents	Validation of list established in Step 1; Identification of situation-specific competencies.
3. Assessment of own Real Competencies (see Chapter IV)	Role Incumbents	Assessment of own performance; Comparison with Ideal profile.
4. Assessment of Real competencies of others (see Chapter IV)	Participants	Assessment of others' performance; Comparison of own and others' assessment of self; Identification of areas for skill-building and/or role clarification.

Step-Where found in Manual (WHY)	Responsibility/Role (WHO)	Expected Outcomes (WHY)
5. Using profile data for performance assessment (see Chapter V)	Participants and their respective supervisors	Assessment of strengths and weaknesses in present performance; Identification of areas needing additional skill-building or attention; Establishment of goals for next round of assessment.
6. Using profile data for role clarification and for role conflict resolution (see Chapter V)	Participants and other district personnel	Identification of areas where role definition is vague or in conflict; Plans for and implementation of activities to clarify role descriptions, decrease or eliminate role conflict (may require a consultant at this point).
7. Using profile data for staff development (see Chapter V)	District personnel and members of institutions of higher education	Identification of areas needing inservice training; identification of agencies/personnel to implement training Identification of areas needing change in preservice programs; planning for modifications in programs to meet identified needs.
8. Using feedback from first round of competency approach for successive rounds (see Chapter V)	Task Force	Identification of strengths and weaknesses of first round; Evaluation of outcomes of first round;

Step-Where found in Manual (WHY)	Responsibility/Role (WHO)	Expected Outcomes (WHY)
8. (Continued)		Identification of needed changes; Plans to implement second round with inclusion of recommended modifications.
9. Round 2: Competency Assessment (see Chapter III)	Participants	Return to Step 2.

APPENDICES

APPENDIX A: DIRECTIONS FOR SOUTHWEST CENTER COMPETENCY WORKSHOP

COMPETENCY STATEMENTS FOR
ADMINISTRATORS OF COMMUNITY EDUCATION

Orientation:

The outcome of the workshop is to produce four sets of competency statements that describe what administrators of community education actually do. Experience indicates that this can most effectively be done when broad categories (task areas) are identified and when statements describing major activities within each task area are specified.

Work Groups:

Four groups will be working somewhat independently: Community School Director, Community School Building Principal, Community Education District Coordinator, and Superintendent as Community Educator. Each group should first discuss major tasks for their role and decide the categories they will use. Competency statements are to be developed for each task area. Examples of statements have been given. A resource person is assigned to each group and the consultants are available when needed.

Task Areas--Competencies--Indicators

Task areas can be identified by labels: Policy making, Program, Management, Personnel, Leadership, Community Clients.

Competency statements are the specification of major parts of each task area--they are stated in "molar" terms to include what is

to be done and the expectation of performance.

Indicators are the specification of each competency in behavioral terms.

Suggestions:

Aim for 6 to 10 competency statements for each task area. Write one or more indicators for each, if you have time, in order to communicate what you feel is implied by the competency.

Where discussion breakdown or disagreement occurs, write two or three statements representative of each one being advocated. Likewise, don't haggle over terms; list several alternatives in parentheses.

Remember that task areas identified and the competency statements will be examined across the groups, edited, screened and validated; accept this stage as a very important first step but not the end product.

APPENDIX B: LISTS OF COMPETENCIES GENERATED BY WORKSHOPS HELD BY THE SOUTHWEST REGIONAL CENTER FOR COMMUNITY EDUCATION DEVELOPMENT

SUPERINTENDENTS IN COMMUNITY EDUCATION PROGRAMS

TASKS	COMPETENCIES	INDICATORS
1.0 Developing a "Climate" for Community Education	Ability	
	1.1 To develop board policies regarding Community Education relationship to total educational program	1.1.1 The inclusion of a set of Community Education policies in the district policy manual
	1.2 To encourage diversity in the total program	1.1.2 Through the development of a well defined procedure for program planning which encourages regular offerings
	1.3 To develop receptivity in school district personnel for Community Education	1.1.3 Through a series of formal and informal meetings with staff to present the values of Community Education program
	1.4 To effect communications with patrons in district	1.1.4 Through a series of formal and informal meetings with community groups and agencies to discuss the value of Community Education
	1.5 To plan for conflict resolution as required	1.1.5 Through providing inservice programs for staff in conflict resolution
2.0 Program Planning	2.1 To initiate needs assessment for Community Education	2.1.1 Through documented evidence of formal and informal contacts with various community agencies to determine Community Education needs

SUPERINTENDENTS IN COMMUNITY EDUCATION PROGRAMS

TASKS	COMPETENCIES		INDICATORS	
	2.2	To expedite organization of personnel and facilities	2.2.1	Through written policies and procedures establishing positions, responsibilities, functions and selection for Community Education personnel and facilities
			2.2.2	Through evidence that indicator 2.2.1 is being followed
	2.3	To involve community in determining content of Community Education program	2.3.1	Through the establishment of a Community Education Council
	2.4	To interface with other resource community agencies	2.4.1	Through evidence of establishment of a coordination council including community agency representation
			2.4.2	Through evidence of joint planning with other community agencies and programs
	2.5	To plan inservice programs	2.5.1	Through development of a series of workshops and seminars for pre service and maintenance of the Community Education program
3.0 Public Relations	3.1	To establish a structure for "selling" the program to in-house personnel and community patrons	3.1.1	Through evidence of printed materials and inservice programs designed to solicit support for the Community Education concept

TASKS	COMPETENCIES	INDICATORS
	3.2 To establish a public information program with two-way flow of information and recommendations	3.2.1 Through evidence of utilization of print and electronic media to encourage public support and involvement in Community Education
4.0 Funding the Program	4.1 To provide financial support for Community Education program	4.1.1 Through evidence of budget development indicating expenditures and funding sources
		4.1.2 Through evidence of projected budgetary needs and funding sources for a minimum five year period
5.0 Research and Evaluation	5.1 To provide for a plan of research, development and for evaluation of the Community Education program	5.1.1 Through evidence that each indicator listed above will have an evaluation component which can be audited by an external evaluation team periodically
	5.2 To provide personnel needed to conduct continuous research and evaluation	5.2.1 Through evidence of resources on staff or contracted services for identifying problem areas and effecting research for same
	5.3 To provide funds for research and evaluation activities	5.3.1 Through evidence of a budget line item for research and evaluation

PRINCIPALS IN COMMUNITY EDUCATION PROGRAMS

TASK	COMPETENCIES	INDICATORS
1.0 Philosophy, Goal Setting and Policy Implementation	Ability	
	1.1 To comprehend and implement policy and goals consistent with district philosophy	1.1.1 Develop goal statements consistent with district philosophy
		1.1.2 Demonstrate knowledge of philosophy of district (verbally or in writing)
	1.2 To employ procedures for establishing organizational goals	1.2.1 Establish a representative community council
		1.2.2 Seeks and uses input from council, faculty and students
	1.3 To serve as liaison between school and board of education, district offices, Community Education Director, community	1.3.1 Spends time establishing communication
2.0 Program Development	2.1 To supervise assessment of program needs with the help of the community	2.1.1 Meets periodically with council to discuss directives and needs of program
		2.1.2 Works with community council in establishing a Needs Assessment within the community
	2.2 To supervise planning of instructional and curricular programs	2.2.1 Communicate; encourage other agencies to help provide programs
		2.2.2 Periodically hold meetings with Director
		2.2.3 Review and monitor progress

TASK	COMPETENCIES	INDICATORS
	2.3 To supervise regarding program implementation	
3.0 Program Management	3.1 To apply problem identification and analysis procedures	3.1.1 Use group problem solving techniques (brainstorming sessions)
	3.2 To supervise planning and scheduling in accordance with available facilities and equipment	3.2.1 Delegate to Director responsibility to implement
		3.2.2 Establish guidelines on procedures and facilities and awareness of constraints
		3.2.3 Establish procedures to request facilities
4.0 Developing Climate	4.1 To assess climate of faculty and community toward Community Education	4.1.1 Survey community, staff, suggestions, complaints, turnouts, etc.
	4.2 To clarify roles and responsibilities	4.2.1 Develop job descriptions
	4.3 To generate and maintain a supportive attitude with staff and community	4.3.1 Participate in activities that are part of the Community Education program
	4.4 To work through conflict situations	4.4.1 Use community council to bring people together

PRINCIPALS IN COMMUNITY EDUCATION PROGRAMS

TASK	COMPETENCIES	INDICATORS
5.0 Personnel Management	5.1 To recruit and select competent Community Education Director	5.1.1 Develop job description of Community Education Director
		5.1.2 Advertise
		5.1.3 Interview
		5.1.4 Use committee and council
	5.2 To supervise Community Education Director	5.2.1 Hold evaluation conference periodically
		5.2.2 Develop evaluation procedures
	5.3 To evaluate competence of Community Education Director	5.3.1 Follow through with use of procedures to evaluate
6.0 Financial Management	6.1 To plan all phases of Community Education program consistent with laws that relate to financing Community Education	6.1.1 Know laws
		6.1.2 Development of adequate budget
		6.1.3 Involve Coordinator in preparation of total school budget
	6.2 To organize program with Community Education staff in harmony with financial resources available	
	6.3 To supervise and manage financial affairs relating to district and agency funds	

TASKS	COMPETENCIES	INDICATORS
7.0 Community Relations	7.1 To identify and utilize community resources which effect successful operation of the Community Education program	7.1.1 Get out into the community to make contacts and learn what resources are available
	7.2 To plan and establish a public relations program relating to Community Education	7.2.1 Personal contact with media 7.2.2 Involve District Community Relations department
	7.3 To assist in developing and maintaining a productive Community Education council	7.3.1 Principal be present often 7.3.2 Obtain good cross-section on community council
8.0 Program Evaluation	8.1 To employ professional research techniques	8.1.1 Utilize district research personnel
	8.2 To interpret research data	8.2.1 Write articles, speak, etc. 8.2.2 Share with community council and community
	8.3 To evaluate the Community Education program in relation to education program goals	
	8.4 To utilize evaluative data to modify the Community Education program	

DISTRICT COMMUNITY EDUCATION COORDINATORS IN COMMUNITY EDUCATION PROGRAMS

TASK	COMPETENCIES	INDICATORS
1.0 Organization	Ability	
	1.1 To identify district Community Education goals and objectives for the overall program	1.1.1 Has utilized the input of committees to develop goals and objectives
		1.1.2 Has compiled goals and objectives in a written document
		1.1.3 Has included input consistent with district goals and objectives
		1.1.4 Has re-evaluated goals and objectives to update and change as necessary
	1.2 To develop strategies for accomplishing goals and objectives	1.2.1 Agenda of District Council has indicated input by local coordinators and local Council members
		1.2.2 Has contacted agencies or persons indicated in goals and objectives
		1.2.3 Has organized and planned activities in consonance with stated goals.
	1.3 To provide advice to local unit coordinators in the development of goals which are in consonance with district policy	1.3.1 Has provided periodic meetings to train directors in techniques and procedures involved with goal attainment
		1.3.2 Has provided appropriate updating of system policy and regulation changes
		1.3.3 Has provided opportunities for unit directors to input data for needed changes
	1.4 To assist building level directors and community groups in the development and implementation of surveys, Needs Assessments, etc.	1.4.1 Has gathered and collected data from various sources such as City Planning Department, University, Etc.
		1.4.2 Has developed graphic presentations and materials for use in survey or needs assessment instruments
		1.4.3 Has developed documents for use at various levels
		1.4.4 Has worked with local Research and Development Office or University Regional Center to validate documents
		1.4.5 Has procured resources and has monitored printing of instruments
		1.4.6 Has provided mailing lists and other communication devices for unit directors

DISTRICT COMMUNITY EDUCATION COORDINATORS IN COMMUNITY EDUCATION PROGRAMS

TASK	COMPETENCIES	INDICATORS
		1.4.7 Has arranged for, or through, community groups, methods of obtaining data for development of survey or needs assessment instruments
	1.5 To identify resources in the community	1.5.1 Has gathered information concerning available resources
		1.5.2 Has compiled human and monetary resources into a directory for use by unit directors
		1.5.3 Has contacted human resources in the community to solicit support for Community Schools
	1.6 To develop programs which have district-wide application	1.6.1 Has assessed broad-based interest
		1.6.2 Has contacted community agencies to provide district-wide services, i.e., Adult Education, YMCA, Health Department, etc.
		1.6.3 Has worked with local principals to determine needs which has included the integration of Community Education Services into the schools
	1.7 To initiate structure through which the organization functions	1.7.1 Has developed line and staff responsibilities and has shown them on an organizational chart
		1.7.2 Has provided a regular agenda with back-up material as needed
		1.7.3 Has provided financial procedures for unit directors
		1.7.4 Has drafted needed forms to implement Community School Programs
	1.8 To utilize various management systems and leadership styles	1.8.1 Has developed a systematic approach to management
		1.8.2 Has provided for democratic process in meetings
		1.8.3 Has made unilateral decisions as appropriate
2.0 School Board Relations	2.1 To develop a working knowledge of existing board policy	2.1.1 Has familarized himself with the District Policy Manual
		2.1.2 Has extracted and interpreted policies and regulations which reflect the functions of the Community Education program

TASK	COMPETENCIES	INDICATORS
		2.1.3 Has worked with the School Board and developed an understanding level and acceptance of the Community Education concept
	2.2 To advise the board on the development of needed Community Education policy	2.2.1 Has made a presentation to the board concerning the Community Education program
		2.2.2 Has provided the board with documents defining Community Education
		2.2.3 Has provided the board with documents stating needs which can be addressed by Community Education
		2.2.4 Has advised the board of other programs and the varied approaches to Community Education as a district program
		2.2.5 Has informed the board as to the current trends of Community Education in other States
	2.3 To develop regulations which define board policy dealing with Community Education	2.3.1 Has worked with district administration to prepare appropriate documents for the Community Education program
		2.3.2 Has worked to involve the input of local community members to develop workable Community Education documents
		2.3.3 Has implemented procedures to plan, organize, and write a document which is acceptable to the school board as well as to the community
	2.4 To prepare and present reports to the district board concerning fiscal status, intents, etc.	2.4.1 Has coordinated with the board and other school administration to collect appropriate data
		2.4.2 Has established criteria and priorities for the development of appropriate documents
3.0 Fiscal Tasks	3.1 To develop budget information, such as sources of funding, cost estimates, etc.	3.1.1 Has developed a resource list of available funding sources
		3.1.2 Has prepared a budget reflective of the goals, objectives and priorities of the program

TASK	COMPETENCIES	INDICATORS
		3.1.3 Has coordinated with appropriate district staff concerning fiscal matters of the Community Education program
	3.2 To administer the adopted budget	3.2.1 Has developed a system to monitor the movement of funds within the program
		3.2.2 Has maintained coordination with the district budget personnel on a regular basis
		3.2.3 Has utilized budget procedures to assist in the further development of appropriate fiscal control of allocated monies
	3.3 To assess effectiveness of expenditures	3.3.1 Has planned expenditures in consonance with the program priorities
		3.3.2 Has followed established budget procedures in maintaining accountability
		3.3.3 Has provided a budget monitoring system for the purpose of accounting for funds
		3.3.4 Has provided reports of budget operations to appropriate authorities
4.0 Working With Publics	4.1 To organize and coordinate the work of a district Community Education council	4.1.1 Has planned for a District Community Education Council by working in close harmony with various local councils
		4.1.2 Has developed a structure for the implementation of a broad-based council
		4.1.3 Has worked to implement a district council based upon the tenets of Community Education
	4.2 To communicate with all components of the community	4.2.1 Has identified the various representative groups which make up the community
		4.2.2 Has established a calling list based upon the agencies and groups which make up the community
		4.2.3 Has extended invitations to participate in a district council to the various subpublics which make up the community
		4.2.4 Has provided for effective two-way communication among the various components of the community
	4.3 To promote the Community Education concept through the various media	4.3.1 Has made contact with the key media people

TASK	COMPETENCIES	INDICATORS
		4.3.2 Has provided available information to the media concerning the various program activities
		4.3.3 Has explored the various types of media presentations for use in the overall program
		4.3.4 Has involved media professionals in the understanding of the Community Education concept
		4.3.5 Has an understanding of the procedures involved in the preparation of quality media presentation
5.0 Supervision	5.1 To employ human relations skills in all individual and group relationships	5.1.1 Has an awareness of human relations skills and has utilized them in the day-to-day operations of the Community Education program
		5.1.2 Has worked to develop good communications linkages with the community through the application of human relations skills
		5.1.3 Has provided opportunities for community members to grow and develop in their community schools
		5.1.4 Has promoted good communications techniques and exercised them in the operation of the program
		5.1.5 Employs democratic processes in group meetings
		5.1.6 Compliments individuals wherever the occasion arises, but points out inadequacies in private
	5.2 To recognize areas of conflict and engage effectively in conflict resolution	5.2.1 Has knowledge of creative conflict management techniques
		5.2.2 Has worked to eliminate or reduce the incidence of conflict
		5.2.3 Has promoted positive attitudes about school and communities toward the elimination of conflict
		5.2.4 Is aware of conflict as an inevitable part of life in communicating with lay and professional groups and individuals

TASK	COMPETENCIES	INDICATORS
		5.2.5 Adheres to agenda items to prevent conflicts but allows conflicts to be brought out with time for all views
	5.3 To consult with building unit coordinators and suggest alternatives to methods used	5.3.1 Has counselled with local unit coordinators concerning the various aspects of the operation
		5.3.2 Has worked with unit principals and maintained liaison between that person and the unit coordinator
		5.3.3 Has provided workshops and/or other training for local unit coordinators
		5.3.4 Has worked to promote harmonious relationships among school staff and local unit coordinators
		5.3.5 Meetings are planned with agenda and minutes to discuss processes
		5.3.6 Workshops are utilized when appropriate to implement new processes
	5.4 To utilize a coordinated approach to the various levels and roles involved in providing Community Education programs (A team approach)	5.4.1 Has evaluated each situation in terms of resources in solving problems in a unified manner
		5.4.2 Has assured the involvement of all entities in the solution of problems
		5.4.3 Has worked beyond the traditional methods of conflict management
		5.4.4 Unit directors provide input through coordinating sessions
6.0 Personnel Administration	6.1 To recruit, interview and recommend unit Community Education Directors	6.1.1 Contacts are made with the Regional Center for Community Education Development
		6.1.2 Assists applicants in processing credentials with the school district
		6.1.3 Recommends convening of screening committees when needed
		6.1.4 Travels to nearby schools to interview applicants
	6.2 To select support staff for the Community Education program	6.2.1 Has developed interview techniques for selection of staff
		6.2.2 Has developed job descriptions through the Personnel Department which indicates functions needed in Community School Program

TASK	COMPETENCIES	INDICATORS
		6.2.3 Involves the Community School Director in selection of support staff
	6.3 To provide pre-service, in-service, training and/or orientation for Community Education personnel	6.3.1 Programs in-service meetings when appropriate items are identified
		6.3.2 All new personnel are given an orientation session which involves staff participation
		6.3.3 Staff is provided with opportunities to attend training sessions sponsored outside the school system
		6.3.4 Budget funds are allocated for training, workshops, etc.
	6.4 To develop specifications for job descriptions for the Community School Personnel	6.4.1 Utilizes the system format for job descriptions
		6.4.2 Specifications are forwarded to appropriate Personnel staff for promulgation and approval by the Board
		6.4.3 Job descriptions are updated as functions change
		6.4.4 Funding requests for salary adjustments are prepared in time for system budget preparation
	6.5 To clarify the role of the Community Education Directors and their relationships with district and local staffs	6.5.1 Meets with unit line administration to check status of programs
		6.5.2 Meetings with faculty members are encouraged to assure the Community Education concept is understood and ramifications to faculties made clear
		6.5.3 Articles are drafted in vignette style to describe the functions of the Community Education Director
	6.6 To evaluate the effectiveness of Community Education Directors	6.6.1 Liaison has been established with Personnel and Research offices to plan for evaluation
		6.6.2 An evaluation instrument is developed and is being implemented
		6.6.3 Evaluations have been discussed with the unit Principal and the Community Education Director
	6.7 To recognize the functions, needs, and problems of	6.7.1 Has established an organizational chart with job descriptions with which the

DISTRICT COMMUNITY EDUCATION COORDINATORS IN COMMUNITY EDUCATION PROGRAMS

TASK	COMPETENCIES	INDICATORS
		6.7.2 Has established a method through which Community Education Directors feel comfortable in bringing problems to the coordinator
		6.7.3 Assures that "needs" appear as agenda items at meetings of the district's Community Education Directors
7.0 Program Evaluation	7.1 To utilize both formal and informal methods of evaluation	7.1.1 Has developed instruments for formal evaluation of program and processes
		7.1.2 Maintains memoranda reflecting periodic informal judgements of both program and processes
	7.2 To develop criteria upon which qualitative and quantitative judgements may be made	7.2.1 Has sought input from Community Education Directors
		7.2.2 Has conducted reliability tests to ascertain the worth of evaluation instruments
		7.2.3 Has obtained input from outside agencies and groups for establishing evaluation criteria
	7.3 To assist the Community Education Directors in the development of their instruments for the evaluation of programs	7.3.1 Has developed instruments for local use
		7.3.2 Has designed instruments for ease of use at the local level
		7.3.3 Has planned meetings at the local program level to test evaluation instruments to aid the Community Education Director in administering them
	7.4 To compile and correlate the evaluations for district reports and recommendations for future programming	7.4.1 Has written reports and disseminated them to proper staff
		7.4.2 Has established a procedure to obtain data needed for reports

COMMUNITY EDUCATION DIRECTORS IN COMMUNITY EDUCATION PROGRAMS

TASKS	COMPETENCIES	INDICATORS
1.0 Leadership	1.1 Provide motivation for staff, students and community members for participation in Community Education program	1.1.1 See measurable increase in participation
		1.1.2 Change on schedule & program are made
	1.2 Adapt to changing situations concerning community needs	1.1.3 Presides at brainstorming Sessions and discussion groups
	1.3 Offer leadership through effective two-way communication in challenging outdated ideas and proposing alternatives	1.1.4 Staff includes semi-professional & community
	1.4 Delegate responsibilities and live with results	
	1.5 Serve as facilitator for decision making, group planning, etc.	
2.0 Public Relations	2.1 Educate the community about the Community Education concept	2.1.1 Prepares media releases
	2.2 Establishes and maintains positive relationships with school district administrators, school personnel and community members	2.2.1 Awareness 2.2.2 On-going communication

COMMUNITY EDUCATION DIRECTORS IN COMMUNITY EDUCATION PROGRAMS

TASKS	COMPETENCIES	INDICATORS
	2.3 Utilizes community agencies	2.3.1 Obtains input, staff, money and facilities
3.0 Community Involvement	3.1 Survey, interpret and meet community needs	3.1.1 Needs Assessment 3.1.2 Identify priorities 3.1.3 Develop program to meet needs
	3.2 Recruit and encourage community participation	3.2.1 Contacts leaders, agencies, senior citizens, businesses, etc.
	3.3 Identify and use human and physical resources	3.3.1 Survey
4.0 Program Development	4.1 Coordinate and schedule use of facilities with other administrators	4.1.1 Calendar, times, places, etc.
	4.2 Organize goals and objectives for the program	
	4.3 Implement the program	4.3.1 Offer classes 4.3.2 Activities for senior citizens
	4.4 Evaluate the program's effectiveness on continuous basis	
	4.5 Provide inservice opportunities	4.5.1 Workshops for staff 4.5.2 Provides information on training possibilities

COMMUNITY EDUCATION DIRECTORS IN COMMUNITY EDUCATION PROGRAMS

TASKS	COMPETENCIES	INDICATORS
5.0 Budget	5.1 Plan and present a workable budget	5.1 Get approval for budget from School board.
	5.2 Find many sources of funding to implement the Community Education program	5.2 Budget reflects several sources of funding.
	5.3 Maintain an accurate financial record system	5.3 Have available for inspection ledger and receipts, time cards and other documents.
6.0 Personnel	6.1 Specify job requirements	6.1 Develop an instument describing job description.
	6.2 Recruit, interview and select	6.2 Advertise for positions available set up criteria for interview.
	6.3 Assess and evaluate performance	6.3 Set up an evaluating session periodically with staff.
	6.4 Supervise Community Education staff	6.4 Develop evaluation instrument with staff.
	6.5 Promote cooperation with day staff	6.5 Plan weekly or monthly staff meeting.

APPENDIX C: IDEAL COMPETENCIES IN COMMUNITY EDUCATION ADMINISTRATION, AS DEVELOPED IN WORKSHOPS HELD BY THE SOUTHWEST REGIONAL CENTER FOR COMMUNITY EDUCATION DEVELOPMENT

IDEAL COMPETENCY RATING INSTRUMENT

SUPERINTENDENT

NAME _____ SCHOOL _____

DATE _____ DISTRICT _____

Directions: The list below of competency statements for the position of Superintendent was developed and validated by a group of Superintendents and Administrators of Community Schools. In order to establish a listing of competencies that reflects needs for your district and for the current school year, please rate the competencies by circling the number on the scale following each competency. For the scale, the ratings are as follows:

5 = Very Important (for a Superintendent in your district)
4 = Important
3 = Somewhat Important
2 = Not Very Important
1 = Unimportant
0 = Does Not Apply or Can't Rate

You should differentiate among items; that is, some items should be ranked "1", some "2", some "3", some "4", and some "5".

Importance of Ability to:

1)	Assume leadership in the development of board policies regarding Community Education's relationship to the total education program	5 4 3 2 1 0
2)	Encourage diversity in the total program of the district as desired by community	5 4 3 2 1 0
3)	Develop receptivity on the part of school district personnel and community patrons for Community Education	5 4 3 2 1 0
4)	Effect communications with patrons in the district	5 4 3 2 1 0
5)	Identify problems and manage conflicts	5 4 3 2 1 0

6)	Organize district programs, personnel, and facilities	5	4	3	2	1	0
7)	Through needs assessment involve the community in determining the content of the Community Education program	5	4	3	2	1	0
8)	Interface with other community resources and agencies	5	4	3	2	1	0
9)	Foster the personal growth and development of all staff and faculty, including that of self	5	4	3	2	1	0
10)	Establish a public information program with two-way flow of information and recommendations	5	4	3	2	1	0
11)	Provide leadership in securing financial support for Community Education programs	5	4	3	2	1	0
12)	Provide for a plan of research, development and evaluation for the Community Education program	5	4	3	2	1	0

IDEAL COMPETENCY RATING INSTRUMENT

PRINCIPAL

NAME _____ SCHOOL _____

DATE _____ DISTRICT _____

Directions: The list below of competency statements for the position of Principal was developed and validated by a group of Principals and Administrators of Community Schools. In order to establish a listing of competencies that reflects needs for your district and for the current school year, please rate the competencies by circling the number on the scale following each competency. For the scale the ratings are as follows:

5 = Very Important (for a Principal in your district)
4 = Important
3 = Somewhat Important
2 = Not Very Important
1 = Unimportant
0 = Does Not Apply or Can't Rate

You should differentiate among items; that is, some items should be ranked "1", some "2", some "3", some "4", and some "5".

Importance of Ability to:

1)	Comprehend and implement policy and goals consistent with district philosophy	5	4	3	2	1	0
2)	Employ procedures for establishing organizational goals	5	4	3	2	1	0
3)	Serve as liaison between school and Board of Education, district offices, Community Education director, and community	5	4	3	2	1	0
4)	Supervise assessment of program needs with the help of the community	5	4	3	2	1	0
5)	Supervise planning of instructional and curricular programs	5	4	3	2	1	0
6)	Supervise program implementation	5	4	3	2	1	0

7)	Apply problem-solving procedures	5	4	3	2	1	0
8)	Supervise planning and scheduling in accordance with available facilities and equipment	5	4	3	2	1	0
9)	Assess school and community attitudes toward Community Education	5	4	3	2	1	0
10)	Clarify roles and responsibilities in the Community School	5	4	3	2	1	0
11)	Generate and maintain a supportive attitude with staff and community	5	4	3	2	1	0
12)	Work through conflict situations	5	4	3	2	1	0
13)	Recruit and select a competent Community Education Director	5	4	3	2	1	0
14)	Supervise the Community Education Director	5	4	3	2	1	0
15)	Regularly evaluate the competence of Community Education Director	5	4	3	2	1	0
16)	Plan all phases of Community Education program consistent with laws that relate to financing Community Education	5	4	3	2	1	0
17)	Organize program with Community Education staff in harmony with financial resources available	5	4	3	2	1	0
18)	Supervise and manage financial affairs relating to district and agency funds	5	4	3	2	1	0
)	Identify and utilize community resources which effect successful operation of the Community Education program	5	4	3	2	1	0
20)	Plan and establish a public relations program relating to Community Education	5	4	3	2	1	0
21)	Assist in developing and maintaining a productive Community Education council	5	4	3	2	1	0
22)	Employ professional research techniques	5	4	3	2	1	0
23)	Interpret research data	5	4	3	2	1	0
24)	Evaluate the Community Education program in relation to education program goals	5	4	3	2	1	0
25)	Utilize evaluative data to modify the Community Education program	5	4	3	2	1	0

IDEAL COMPETENCY RATING INSTRUMENT

DISTRICT COMMUNITY EDUCATION COORDINATOR

NAME_____ SCHOOL_____

DATE_____ DISTRICT_____

Directions: The list below of competency statements for the position of District Community Education Coordinator was developed and validated by a group of Coordinators and Administrators of Community Schools. In order to establish a listing of competencies that reflects needs for your district and for the current school year, please rate the competencies by circling the number on the scale following each competency. For the scale, the ratings are as follows:

5 = Very Important (for a Coordinator in your district)
4 = Important
3 = Somewhat Important
2 = Not Very Important
1 = Unimportant
0 = Does Not Apply or Can't Rate

You should differentiate among items; that is, some items should be ranked "1", some "2", some "3", some "4", and some "5".

Importance of Ability to:

1)	Identify district Community Education goals and objectives for the overall program	5	4	3	2	1	0
2)	Develop strategies for accomplishing goals and objectives	5	4	3	2	1	0
3)	Provide advice to local unit coordinators in the goal development process	5	4	3	2	1	0
4)	Assist building level directors and community groups in the development and implementation of surveys, Needs Assessments, etc.	5	4	3	2	1	0
5)	Identify resources in the community	5	4	3	2	1	0
6)	Develop programs which meet identified district-wide needs	5	4	3	2	1	0
7)	Develop structures through which the Community Education program functions	5	4	3	2	1	0

8)	Utilize various management systems and leadership styles	5	4	3	2	1	0
9)	Have a working knowledge of existing board policy as it relates to Community Education	5	4	3	2	1	0
10)	Advise the Board through proper channels on the development of needed Community Education policy	5	4	3	2	1	0
11)	Develop regulations which define board policy dealing with Community Education	5	4	3	2	1	0
12)	Prepare and present reports to the board through proper channels concerning fiscal status, intents, etc.	5	4	3	2	1	0
13)	Develop a budget and furnish information, such as sources of funding, cost estimates, etc.	5	4	3	2	1	0
14)	Administer the adopted budget	5	4	3	2	1	0
15)	Assess effectiveness of expenditures	5	4	3	2	1	0
16)	Facilitate, guide and coordinate the work of a district Community Education council	5	4	3	2	1	0
17)	Communicate with all segments and elements of the community	5	4	3	2	1	0
18)	Promote the Community Education concept through the various media	5	4	3	2	1	0
19)	Employ effective human relations skills	5	4	3	2	1	0
20)	Engage effectively in conflict resolution	5	4	3	2	1	0
21)	Provide building unit coordinators with alternative problem solutions	5	4	3	2	1	0
22)	Utilize a team approach at the various organizational levels in providing Community Education programs	5	4	3	2	1	0
23)	Recruit, interview and recommend unit Community Education directors	5	4	3	2	1	0
24)	Select support staff for the Community Education program	5	4	3	2	1	0
25)	Provide pre-service, in-service, training and/or orientation for Community Education personnel	5	4	3	2	1	0

26)	Develop specifications for job descriptions for the Community School personnel	5	4	3	2	1	0
27)	Clarify the role of the Community Education directors and their relationships with district and local staffs	5	4	3	2	1	0
28)	Evaluate the effectiveness of Community Education directors	5	4	3	2	1	0
29)	Recognize the functions, needs, and problems of Community Education	5	4	3	2	1	0
30)	Utilize comprehensive methods of evaluation	5	4	3	2	1	0
31)	Assist the Community Education directors in the development of their instruments for the evaluation of programs	5	4	3	2	1	0
32)	Compile and analyze the evaluations for district reports and make recommendations	5	4	3	2	1	0

IDEAL COMPETENCY RATING INSTRUMENT

COMMUNITY SCHOOL DIRECTOR

NAME _____ SCHOOL _____

DATE _____ DISTRICT _____

Directions: The list below of competency statements for the position of Community School Director was developed and validated by a group of Directors and Administrators of Community Schools. In order to establish a listing of competencies that reflects needs for your district and for the current school year, please rate the competencies by circling the number on the scale following each competency. For the scale, the ratings are as follows:

5 = Very Important (for a Director in your district)
4 = Important
3 = Somewhat Important
2 = Not Very Important
1 = Unimportant
0 = Does Not Apply or Can't Rate

You should differentiate among items; that is, some items should be ranked "1", some "2", some "3", some "4", and some "5".

Importance of Ability to:

1) Provide a community school program in which students and community members will participate 5 4 3 2 1 0

2) Work with staff in understanding their role in Community Education and in supporting and working effectively with Community Education 5 4 3 2 1 0

3) Respond to changing situations within the community and adapt the program to meet changing needs using Community Council input 5 4 3 2 1 0

4) Use effective two-way communication 5 4 3 2 1 0

5) Appropriately assign work and monitor results -- delegating responsibility 5 4 3 2 1 0

6)	Work with school and community groups in assessment, planning, decision making and evaluation --facilitate the problem-solving process	5	4	3	2	1	0
7)	Educate the community about the Community Education Concept	5	4	3	2	1	0
8)	Develop and disseminate public relations materials	5	4	3	2	1	0
9)	Establish and maintain positive working and personal relationships with school and community people	5	4	3	2	1	0
10)	Promote an atmosphere which encourages positive interactions -- environment of trust	5	4	3	2	1	0
11)	Cooperate with community agencies to result in mutual benefits -- exchange of assets	5	4	3	2	1	0
12)	Work with the Council to assess community needs and to program accordingly	5	4	3	2	1	0
13)	Identify and use human, financial and physical resources	5	4	3	2	1	0
14)	Obtain, coordinate and schedule use of facilities	5	4	3	2	1	0
15)	Keep accurate records	5	4	3	2	1	0
16)	Identify and prioritize goals and objectives for the Community School program	5	4	3	2	1	0
17)	Manage Community Education programs and services						
18)	Establish an evaluation process to assess program effectiveness on a continuous basis	5	4	3	2	1	0
19)	Provide and participate in in-service opportunities	5	4	3	2	1	0
20)	Maintain an accurate financial record system	5	4	3	2	1	0
21)	Specify job requirements for Community School staff (paid and volunteer)	5	4	3	2	1	0
22)	Recruit, interview and select personnel for the Community School program	5	4	3	2	1	0
23)	Supervise and evaluate the performance of Community School staff	5	4	3	2	1	0
24)	Promote cooperation between day and evening Community School staff	5	4	3	2	1	0

APPENDIX D: REAL COMPETENCIES IN COMMUNITY EDUCATION ADMINISTRATION

6)	Organize district programs, personnel, and facilities	5	4	3	2	1	0
7)	Through needs assessment involve the community in determining the content of the Community Education program	5	4	3	2	1	0
8)	Interface with other community resources and agencies	5	4	3	2	1	0
9)	Foster the personal growth and development of all staff and faculty, including that of self	5	4	3	2	1	0
10)	Establish a public information program with two-way flow of information and recommendations	5	4	3	2	1	0
11)	Provide leadership in securing financial support for Community Education programs	5	4	3	2	1	0
12)	Provide for a plan of research, development and evaluation for the Community Education program	5	4	3	2	1	0

REAL or ACTUAL COMPETENCY RATING INSTRUMENT

PRINCIPAL

NAME _____ YOUR POSITION _____

DATE _____ DISTRICT _____

RATING OF _____

Directions: The list of competency statements for the position of Principal below is a list developed and validated for this position. You are asked to rate the performance of the person listed above as you perceive his/her performance to be in terms of each competency. A rating of 5 means that you feel that this principal is performing at the highest level of effectiveness; a rating of 1 means that you feel the principal is performing at the lowest level of effectiveness.

Importance of Ability to:

1)	Comprehend and implement policy and goals consistent with district philosophy	5 4 3 2 1
2)	Employ procedures for establishing organizational goals	5 4 3 2 1
3)	Serve as liaison between school and Board of Education, district offices, Community Education director, and community	5 4 3 2 1
4)	Supervise assessment of program needs with the help of the community	5 4 3 2 1
5)	Supervise planning of instructional and curricular programs	5 4 3 2 1
6)	Supervise program implementation	5 4 3 2 1

7)	Apply problem-solving procedures	5	4	3	2	1	0
8)	Supervise planning and scheduling in accordance with available facilities and equipment	5	4	3	2	1	0
9)	Assess school and community attitudes toward Community Education	5	4	3	2	1	0
10)	Clarify roles and responsibilities in the Community School	5	4	3	2	1	0
11)	Generate and maintain a supportive attitude with staff and community	5	4	3	2	1	0
12)	Work through conflict situations	5	4	3	2	1	0
13)	Recruit and select a competent Community Education Director	5	4	3	2	1	0
14)	Supervise the Community Education Director	5	4	3	2	1	0
15)	Regularly evaluate the competence of Community Education Director	5	4	3	2	1	0
16)	Plan all phases of Community Education program consistent with laws that relate to financing Community Education	5	4	3	2	1	0
17)	Organize program with Community Education staff in harmony with financial resources available	5	4	3	2	1	0
18)	Supervise and manage financial affairs relating to district and agency funds	5	4	3	2	1	0
19)	Identify and utilize community resources which effect successful operation of the Community Education program	5	4	3	2	1	0
20)	Plan and establish a public relations program relating to Community Education	5	4	3	2	1	0
21)	Assist in developing and maintaining a productive Community Education council	5	4	3	2	1	0
22)	Employ professional research techniques	5	4	3	2	1	0
23)	Interpret research data	5	4	3	2	1	0
24)	Evaluate the Community Education program in relation to education program goals	5	4	3	2	1	0
25)	Utilize evaluative data to modify the Community Education program	5	4	3	2	1	0

REAL or ACTUAL COMPETENCY RATING INSTRUMENT

DISTRICT COMMUNITY EDUCATION COORDINATOR

NAME_____ YOUR POSITION_____

DATE_____ DISTRICT_____

RATING OF_____

Directions: The list of competency statements for the position of District Community Education Coordinator below is a list developed and validated for this position. You are asked to rate the performance of the person listed above as you perceive his/her performance to be in terms of each competency. A rating of 5 means that you feel that this district community education coordinator is performing at the highest level of effectiveness; a rating of 1 means that you feel the district community education coordinator is performing at the lowest level of effectiveness.

Importance of Ability to:

1)	Identify district Community Education goals and objectives for the overall program	5 4 3 2 1
2)	Develop strategies for accomplishing goals and objectives	5 4 3 2 1
3)	Provide advice to local unit coordinators in the goal development process	5 4 3 2 1
4)	Assist building level directors and community groups in the development and implementation of surveys, Needs Assessments, etc.	5 4 3 2 1
5)	Identify resources in the community	5 4 3 2 1
6)	Develop programs which meet identified district-wide needs	5 4 3 2 1
7)	Develop structures through which the Community Education program functions	5 4 3 2 1

8)	Utilize various management systems and leadership styles	5	4	3	2	1	0
9)	Have a working knowledge of existing board policy as it relates to Community Education	5	4	3	2	1	0
10)	Advise the Board through proper channels on the development of needed Community Education policy	5	4	3	2	1	0
11)	Develop regulations which define board policy dealing with Community Education	5	4	3	2	1	0
12)	Prepare and present reports to the board through proper channels concerning fiscal status, intents, etc.	5	4	3	2	1	0
13)	Develop a budget and furnish information, such as sources of funding, cost estimates, etc.	5	4	3	2	1	0
14)	Administer the adopted budget	5	4	3	2	1	0
15)	Assess effectiveness of expenditures	5	4	3	2	1	0
16)	Facilitate, guide and coordinate the work of a district Community Education council	5	4	3	2	1	0
17)	Communicate with all segments and elements of the community	5	4	3	2	1	0
18)	Promote the Community Education concept through the various media	5	4	3	2	1	0
19)	Employ effective human relations skills	5	4	3	2	1	0
20)	Engage effectively in conflict resolution	5	4	3	2	1	0
21)	Provide building unit coordinators with alternative problem solutions	5	4	3	2	1	0
22)	Utilize a team approach at the various organizational levels in providing Community Education programs	5	4	3	2	1	0
23)	Recruit, interview and recommend unit Community Education directors	5	4	3	2	1	0
24)	Select support staff for the Community Education program	5	4	3	2	1	0
25)	Provide pre-service, in-service, training and/or orientation for Community Education personnel	5	4	3	2	1	0

26)	Develop specifications for job descriptions for the Community School personnel	5	4	3	2	1	0
27)	Clarify the role of the Community Education directors and their relationships with district and local staffs	5	4	3	2	1	0
28)	Evaluate the effectiveness of Community Education directors	5	4	3	2	1	0
29)	Recognize the functions, needs, and problems of Community Education	5	4	3	2	1	0
30)	Utilize comprehensive methods of evaluation	5	4	3	2	1	0
31)	Assist the Community Education directors in the development of their instruments for the evaluation of programs	5	4	3	2	1	0
32)	Compile and analyze the evaluations for district reports and make recommendations	5	4	3	2	1	0

REAL or ACTUAL COMPETENCY RATING INSTRUMENT

COMMUNITY SCHOOL DIRECTOR

NAME_____ YOUR POSITION_____

DATE_____ DISTRICT_____

RATING OF_____

Directions: The list of competency statements for the position of Community School Director below is a list developed and validated for this position. You are asked to rate the performance of the person listed above as you perceive his/her performance to be in terms of each competency. A rating of 5 means that you feel that this community school director is performing at the highest level of effectiveness; a rating of 1 means that you feel the community school director is performing at the lowest level of effectiveness.

Importance of Ability to:

1)	Provide a community school program in which students and community members will participate	5 4 3 2 1
2)	Work with staff in understanding their role in Community Education and in supporting and working effectively with Community Education	5 4 3 2 1
3)	Respond to changing situations within the community and adapt the program to meet changing needs using Community Council input	5 4 3 2 1
4)	Use effective two-way communication	5 4 3 2 1
5)	Appropriately assign work and monitor results -- delegating responsibility	5 4 3 2 1

6)	Work with school and community groups in assessment, planning, decision making and evaluation --facilitate the problem-solving process	5	4	3	2	1	0
7)	Educate the community about the Community Education Concept	5	4	3	2	1	0
8)	Develop and disseminate public relations materials	5	4	3	2	1	0
9)	Establish and maintain positive working and personal relationships with school and community people	5	4	3	2	1	0
10)	Promote an atmosphere which encourages positive interactions -- environment of trust	5	4	3	2	1	0
11)	Cooperate with community agencies to result in mutual benefits -- exchange of assets	5	4	3	2	1	0
12)	Work with the Council to assess community needs and to program accordingly	5	4	3	2	1	0
13)	Identify and use human, financial and physical resources	5	4	3	2	1	0
14)	Obtain, coordinate and schedule use of facilities	5	4	3	2	1	0
15)	Keep accurate records	5	4	3	2	1	0
16)	Identify and prioritize goals and objectives for the Community School program	5	4	3	2	1	0
17)	Manage Community Education programs and services						
18)	Establish an evaluation process to assess program effectiveness on a continuous basis	5	4	3	2	1	0
19)	Provide and participate in in-service opportunities	5	4	3	2	1	0
20)	Maintain an accurate financial record system	5	4	3	2	1	0
21)	Specify job requirements for Community School staff (paid and volunteer)	5	4	3	2	1	0
22)	Recruit, interview and select personnel for the Community School program	5	4	3	2	1	0
23)	Supervise and evaluate the performance of Community School staff	5	4	3	2	1	0
24)	Promote cooperation between day and evening Community School staff	5	4	3	2	1	0

APPENDIX E: RANKINGS OF IDEAL AND REAL COMPETENCIES FOR FOUR ROLES IN COMMUNITY EDUCATION ADMINISTRATION, AS DEVELOPED IN WORKSHOP HELD BY THE SOUTHWEST REGIONAL CENTER FOR COMMUNITY EDUCATION DEVELOPMENT

(Numbers refer to items listed in Appendix D)

COMMUNITY EDUCATION COMPETENCIES

POSITION SUPERINTENDENT

IDEAL VS. REAL

AGGREGATE IDEAL PROFILE	AGGREGATE REAL PROFILE
ITEM NUMBER	ITEM NUMBER
10	2-5
3	4
13	7
5	1
4	3
1	13
8	9
2	12
12	11
6	8
11	10
9	6
7-14	15
	14
	16

COMMUNITY EDUCATION COMPETENCIES

POSITION PRINCIPAL

IDEAL VS. REAL

	AGGREGATE IDEAL PROFILE	AGGREGATE REAL PROFILE
	1	1-11
	11	3
	12	12
H	8	8
I	10	2-9
G	5	13
H	3	10
	19	5
	2	6
	13	14
	15	
	9	
	20	15
	24	19
	6	17
	14	21
	7	18
L	18	4
O	17	7
W	4	20
	25	24-25
	16	23
	23	16
	21	22
	22	

COMMUNITY EDUCATION COMPETENCIES

POSITION DISTRICT COORDINATOR

IDEAL VS. REAL

	AGGREGATE IDEAL PROFILE	AGGREGATE REAL PROFILE
	19	5
	5-6-9-14-29	14
	7	9-19
H	2-18	18
I	17	6
G	10	13
H	13	1
	33	10
	15	21
	1	7
	11-30	2
		12
		24
		17
	25	22
	20	15
	27	8-30
L	16	11
O	22	29
W	12	20
	26	4
	32	31
	28	33
	8-24	25
	23	28
	4	3
	21 3	26
		27
		16
		23

COMMUNITY EDUCATION COMPETENCIES

POSITION COMMUNITY SCHOOL DIRECTOR

IDEAL VS. REAL

	AGGREGATE IDEAL PROFILE	AGGREGATE REAL PROFILE
	1	14
	7	12
	12	8
H	2-5	7
I	6	18
G	24	24
H	21	2-23
		11-13
		10
	13-14-22	1-15
	3	19
L	16	6
O	19	3
W	20	5-22
	8	4
	11	9-21
	15	20
	4	16